Required Report - public distribution

Date: 11/15/2002

GAIN Report #NZ2039

New Zealand

Retail Food Sector

Report

2002

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U.S. Embassy
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Report Highlights:
New Zealand's retail food sector offers U.S. exporters marketing opportunities for a broad spectrum of consumer-ready food products. Import agents and distributors represent the best sales channel for those seeking to establish sales relationship in New Zealand. New, innovative, and high quality food products are in demand.

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
Wellington [NZ1], NZ

Section I. MARKET SUMMARY

- New Zealand is a well-developed market consisting of slightly less than 4 million people, with an annual population growth rate of only 0.5 percent. New Zealand is a largely urbanized society with two-thirds of its citizens residing in the principal urban areas of Auckland (1.12 million), Wellington (445,000) and Christchurch (505,000).
- New Zealand is a developed country with a highly competitive, export oriented agriculture and food industry.
- Consumers generally seek high quality and good tasting foods. They show strong interest in new and innovative products.
- New Zealand's imports of consumer-ready foods totaled US$0.9 billion in 2001. The United States held a 12 percent share of New Zealand's import market for consumer-oriented foods and beverages.
- The United States is New Zealand's second largest trading partner for agricultural products. Agricultural exports from the United States to New Zealand in calender year 2001 totaled 181 million, of which two-thirds consisted of consumer-oriented products. U.S. exports to New Zealand emphasize fresh fruit, processed fruit & vegetables, pet food, snack foods and dairy products. (Note: Trade data in this report are based on FAS' Global Agricultural Trade System which uses data from the United Nations Statistical Office.)
- Annual supermarket sales turnover for New Zealand's retail food sector is estimated at NZ$9 billion (US$ 4.2 billion).
- The retail supermarket sector is dominated by only two companies. Foodstuffs Limited controls 55 percent of the country's supermarket trade while Progressive Enterprises holds nearly all of the remainder.
- Together, Foodstuffs Limited and Progressive Enterprises operate 361 supermarkets throughout New Zealand. Supermarket food sales account for 70 percent of total retail food sales. Gas station convenience stores (1,475 total units) account for an additional 20 percent of retail food sales. Approximately 1,500 small groceries called dairies, which offer a limited selection of staple and snack foods, together with specialized fresh produce shops are responsible for much of the remainder of New Zealand's retail food sales.
- Supermarkets usually offer a variety of products including fresh produce, salad/sandwich bars, prepared pasta and bakery products, fresh seafood, gourmet cheese and dairy products, frozen and dry packaged groceries and well developed delicatessen sections.
- New Zealand does not have a system of 'terminal markets' where independent retail grocers purchase their packaged grocery products and fresh produce.
- Traditional, open air markets which specialize in fresh produce and fish are still found in all cities. Dairy stores often depend on these markets as well as large supermarkets for their food supplies.
- The major supermarket chains purchase locally-grown fresh fruit and vegetables from producers/suppliers while turning to importers/distributors for imported fruits and vegetables. Fish and meat are purchased directly from abattoirs and processors. The two large supermarket chains also are vertically integrated into these food processing industries.
- The Auckland region has the highest concentration of supermarkets. Of the 361 supermarket stores operating in New Zealand, 156 are found in Auckland compared to 114 in the entire South Island and 91 in the lower half of the North Island, which includes Wellington.

- According to the household survey conducted by AC Nielsen in June 2001, the typical New Zealand family spends an average of NZ$125 weekly on food. This represents 17 percent of net total household expenditure.
- **Distribution of Household Food Expenditure**

Stores	***% Expenditure***
Supermarket	**62%**
Restaurants, cafes	**16%**
Fast food operators	**4%**
Dairies	**4%**
Butchers, fishmongers, deli's	**2%**
Greengrocers	**2%**
Other	**10%**
Total	**100%**

Source: Statistics New Zealand, Annual household expenditure by group, 2002

C At present, approximately 22 percent of all food purchases is New Zealand in consumed away-from-home. Per capita away-from-home food sales are estimated at $550 (NZ$260) and is projected to increase 33 percent by 2010.

C Consumer research has identified the following key sales criteria for New Zealand's 18 - 44 year old group to include:
  - S Less reliance on the 3 traditional daily meals
  - S Snacking on-the-run consumption habits
  - S Health concerns
  - S Concerns over environment and price

C In contrast, key food purchasing criteria for consumers over 45 years of age include:
  - S Product quality
  - S Service
  - S Security and safety
  - S Convenience and price

Advantages/Challenges for U.S. Consumer Food Exports to New Zealand

Advantages	**Challenges**
Familiar business environment-- language, communication and customs.	A relatively weak New Zealand dollar against U.S. dollar. High import costs for U.S. products
Minimum barriers to trade. Low tariffs	Close economic ties with Australia. Zero tariffs on Australian products. Imports of U.S. products are assessed 0-7% tariffs.
U.S. products hold an image of 'new' and 'high quality'	Strict phytosanitary/sanitary regulations with regard to fresh produce and meat.
U.S. counter-seasonal fruit production fills market demand	Large food multinationals, including U.S. firms, located in Australia supply many well established food brands.

GM Food Approval

In mid-1999, a mandatory standard for foods produced using modern biotechnology came into effect. The standard prohibits the sale of food produced using gene technology, unless the food has been assessed by the Food Standards Australia New Zealand (FSANZ) and listed in the food code standard. Bioengineered foods on the market when the standard went into effect are currently allowed to be sold under a temporary exemption (based on approval from foreign health agencies like the FDA and application for FSANZ review). As of November 2002, FSANZ had received 23 applications for safety assessments of bioengineered foods, 20 were approved, 2 were withdrawn and 1 remains in the approval process. A list of these approved GM products which include specific GM corn, soybeans, canola, potatoes and sugarbeats can be found at:
http://www.foodstandards.gov.au/whatsinfood/gmfoods/gmcurrentapplication1030.cfm

Food Labeling Requirement for Retail Food Products

All food standards in New Zealand are developed and maintained by the food agency Food Standards Australia New Zealand. This authority is responsible for developing, modifying and reviewing standards of food available in Australia and New Zealand. FSANZ can be reached at:
http://www.foodstandards.govt.nz.

New Zealand consumers are becoming increasingly aware of, and concerned about, the content of the food they eat. FSANZ is introducing new food labeling standards which will take effect for both domestically-produced as well as imported food products on December 20, 2002. This new labeling regime will ensure that consumers have adequate information to make informed decisions about the food they purchase. The new labels must contain nutritional information panels which show the percentage content of the main ingredients as well as listing major allergens.

New Zealand's labeling requirements are similar to the United States with the exception that metric measurement are required (although other measures can be noted). Most major brand lines produced and marketed in New Zealand already include the new nutritional information on their product labels. Date markings are currently required only for food products with a shelf life of less than 90 days. The date marking requirement will be extended to all products with a shelf life of up to 2 years, effective December 2002.

All labeling laws are approved by FSANZ but enforced in New Zealand by the New Zealand Food Safety Authority. The type of required nutrition data which must appear on all food product labels is illustrated by the nutrition panel on the label of a 450g container of strawberry yogurt which would appear as:

Serving sizes per pack: 3 Serving size: 150g	NUTRITION INFORMATION	

	Ave quantity per serving	Ave quantity per 100g
Energy	608KJ	405KJ
Protein	4.2g	2.8g
Fat, total	7.5g	4.9g
- saturated	4.6g	3.0g
Carbohydrate, total	18.6g	12.4g
- sugars	18.6g	12.4g
Sodium	90mg	60mg

Genetically Modified Food Labeling Requirement for Retail Food Products

On December 7, 2001, a new food standard relating to genetically modified (GM) food came into effect. Food or food ingredients, with certain exceptions, must be included on the products ingredients list label with the words 'genetically modified' if genetic material or protein from genetic modification is present in the final food. A 'stock in trade' provision was approved which exempts products manufactured and/or packaged prior to December 7, 2001, even if imported after December 7, 2001, from compliance with the new labeling requirements. Such food products will be allowed to remain on retail shelves up to 12 months. All products manufactured on or after December 7, 2001, must meet the new labeling regulations.

It is the responsibility of the food businesses applying the food label, re-labeling food, or selling the food to meet the requirements of this standard. This includes manufacturers, packers, importers and where appropriate retailers. A stick on label is permitted to convey this information, but it must not hide other information.

A number of exemptions exist for the labeling of GM food. These include:

- **Highly refined foods** (from which novel DNA or novel protein is removed, e.g. refined sugars, oils etc)- unless they have additional GM labeling requirements.
- **Additives and processing aids** (which do not contain novel DNA or novel protein) in the final food.
- **Flavorings** at or below 1gm/kg (0.1%) in the final food.
- **The standard allows up to 10gm/kg** (1%) per ingredient of GM food where its presence is unintended.
- **Food intended for immediate consumption from the point of preparation** (vending vehicles, restaurants, take away outlets, caterers, or self-catering institutions).

Section II. Road Map for Market Entry

A. SUPERMARKETS

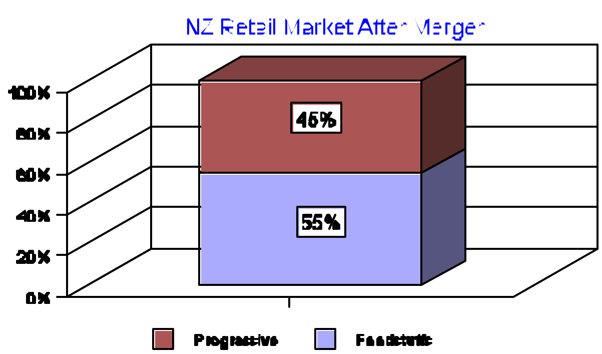
Overview

New Zealand has a population of approximately 4 million. The grocery industry is highly developed with supermarkets and convenience stores in all population centers. There are currently 361 supermarkets stores in New Zealand. The Auckland region found in the northern part of the North Island has 156 supermarkets compared to 114 in the entire South Island and 91 stores in the lower part of the North Island. Average weekly household food expenditure is estimated at NZ$125. Food expenditure for consumption away-from-home accounts for NZ$29.

In total, the New Zealand supermarket food retail sector is a NZ$9 billion (US$4.2 billion) industry. About 70 percent of all retail product food sales are made through supermarkets, 20 percent through gasoline stations/convenience stores, and 10 percent through corner stores called dairies.

Retail Food Sector

Australian retail food giant Foodland Associated, owner of New Zealand's Progressive Enterprises supermarket chain, purchased the Woolworth Limited retail chain in Mid-2002 for NZ$690 million (US$324 million). The purchase was finalized only after legal obstacles related to anti-competitive objections raised by its primary competitor, Foodstuffs Limited, were overcome. The purchase raises Progressive's share of New Zealand's supermarket trade from 25 percent to 45 percent. The revamped industry is now effectively a duopoly of Progressive Enterprises and Foodstuffs Limited. Foodland has indicated that it intends to expand its operations by opening at least five new supermarkets annually over the next few years. Foodland estimates that this will require an annual capital expenditure of NZ$45 million ($21.6 million). Foodland anticipates that improved profit margins will be derived from the synergy benefits generated over a three year period through brand rationalization, reduced marketing costs and supply chain economies.



Despite the recent enlargement of the Progressive chain, Foodstuffs Limited remains New Zealand's largest supermarket group. Foodstuffs continues to control 55 percent of the country's supermarket trade with an annual turnover of NZ$6 billion.

Foodstuffs Limited recently signed a joint venture with Australia's fifth biggest bank, St. George, which will offer banking services at its supermarket stores. Banking services will be based on a successful model developed in Britain with grocery giants Tesco and Sainsbury's. In this partnership, Foodstuffs brings customers, marketing and distribution, while St. George brings banking expertise, innovative financial products and internet capabilities. The joint venture is expected to be launched within a year at all Foodstuffs supermarket stores.

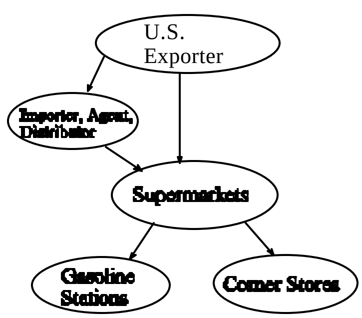
Market Structure

Supermarket	**Owned By**	**Market Share**	**Supermarket**
Foodstuffs (NZ) Ltd	New Zealand owned. Consists of three independently owned co-operatives	55%	C New World C Pak N Save C Write Price C Four Square
Progressive Enterprises	Australian Owned. Foodland Associated is the parent company	45%	C Woolworth C Foodtown C Countdown C Big Fresh C 3 Guys

Distribution Channel

New Zealand's supermarket distribution channels are relatively simple. Individual supermarket chains have distribution centers located throughout New Zealand to supply their retail outlets. Supermarkets either import directly from a foreign food exporter or buy from local importers/distributors. Supermarkets also purchase directly from local food manufacturing companies.

Food distribution flowchart



Retail industry information

Foodsuffs Limited is New Zealand's largest grocery distributor, consisting of 149 stores in New Zealand. The marketings organization of Foodstuffs Limited consists of three regionally based, retailer-owned co-operative companies, along with their parent company Foodstuffs (NZ) Ltd. The three co-operatives are: Foodstuffs (Auckland) Co-operative Society Limited, which covers the middle to upper North Island; Foodstuffs (Wellington) Co-operative Society Ltd, which covers the southern half of the North Island; and Foodstuffs (South Island) Co-operative Society Limited which covers the entire South Island. U.S. exporters should contact each of the regional Foodstuffs offices since they make buying decisions independently of each other.

Foodstuffs (Wellington) Co-operative Society Limited PO Box 38-896 Kiln Street, Silverstream Wellington, New Zealand Atn: Eve Kelly, Purchase Manager Tel: +64-4-527-2510 Email: eve.kelly@foodstuffs-wgtn.co.nz	***Foodstuffs (Auckland) Co-operative Society Limited*** PO Box CX12021 Auckland, New Zealand Atn: Mr. Tony Olson, Purchase Manager Tel: +64-4-621-0641 Email: tolson@foodstuffs.co.nz
Foodstuffs (South Island) Co-operative Society Limited 167, Main North Road, Papanui Christchurch, New Zealand Atn: Graham May, Purchase Manager Tel: +64-3-353-8648 Email: gmay@foodstuffs-si.co.nz	

Progressive Enterprise Limited is 100 percent owned by Foodland Associated Limited, one of Australia's largest publicly listed companies. Foodland operates retail outlets in both Australia and New Zealand. It holds 45 percent of the New Zealand's grocery market and operates 179 stores in New Zealand under the supermarket banner group of Foodtown, Woolworths, Coutdown, Big Fresh, Price Chooper and 3Guys.

All import purchasing decisions by Progressive are made at its headquarters in Auckland. Exporters may contact the following office regarding export sales enquiries:

Progressive Enterprises
Private Bag 93306
Otahuhu
Auckland, New Zealand
Atn: Graham Walker, Business Manager
Tel +64-9-275-2621
email: graham.walker@progressive.co.nz

Entry Strategy

New Zealand's retail food sales are affected by New Zealand's changing lifestyles. Emerging trends include:

- New Zealand consumers are open to 'new' or 'unique' U.S. food products. Consumer-ready foods continue to dominate the import market.
- The traditional 'starting from scratch meal' is in decline. In 2001, 50 percent of those cooking the evening meal used pre-prepared ingredients in comparison to 45 percent in 1999. Heat & eat chilled foods, frozen foods and ethnic carry-out food consumption is on the rise.
- New Zealand's multi-cultural population is prompting an increase in ethnic style food consumption. Supermarkets are responding by devoting increased shelf space and expanding the range of ethnic food products to include fresh, frozen and ready-to-eat meals.
- The average New Zealand household spends NZ$125 (US$59.00) per week on food. Close to 80 percent of this figure is dedicated to meals prepared at home. Consumption of red meat and dairy products is on the decline while consumption of fresh fruit and vegetables and fish is increasing.
- Supermarket sales of ready-to-eat meals has doubled over the past 4 years to US$31 million.
- The trend towards meat-free meals is growing. Close to with 50 percent of all New Zealanders eat at least one meat-free meal weekly.
- Due to busy lifestyles and demanding workplaces, the trend to eat out or use ready-to-eat and heat & eat meals is on the rise. Microwave ovens are present in 70 percent of all New Zealand homes. There are opportunities for U.S. exporters for sales of prepared or microwave-ready meals, frozen and pack-to-plate foods, and snacks. Strong competition exists, however, from Australian and New Zealand products.
- 23 percent of New Zealand food expenditures is spent on food consumed away-from-home, compared to 45 percent in the United States, 40 percent in Canada and 27 percent in the United Kingdom.
- Tariffs on imported food products already are low (no more than 7 percent) and are scheduled to be reduced further over the next few years.
- Relatively strict sanitary and phytosanitary standards need to be met for exporting fresh produce, meat, and poultry products to New Zealand.
- New Zealand has well defined food standards and labeling requirements which are set out in the joint Food Standards Australia New Zealand (FSANZ). For more information see www.foodstandards.govt.nz
- U.S. food products are generally viewed in New Zealand as 'new' and 'high quality'.
- U.S. exporters may elect to appoint agents, distributors or import brokers who can target food buyers representing convenience store and supermarket chains. About 90 percent of all imported retail food products are distributed within New Zealand through agents/distributors.
- Specialty importers/wholesalers may also be approached. For example, there are several importers who specialize in importing dried fruit and nuts, and other consumer-ready products.
- Dry food products often are imported in bulk and repackaged into smaller retail sizes by importers/distributors.

- New Zealand importers frequently make purchases from suppliers met at international food shows such as FMI, ANUGA, SIAL.
- Advertising and product sampling in supermarkets helps promote new items. Product also can be introduced/advertised using key retail magazines in New Zealand such as FMCG and Grocers' Review.
- Fresh products can be marketed directly through speciality importers who offer storage and handling services to major supermarkets.

Food Trends

Retail food sales are affected by changing lifestyles and emerging trends which include:

- New Zealand consumers are open to 'new' or 'unique' U.S. food products. Consumer-ready foods continue to dominate the import market.
- A household spends an average NZ$125 (US$52) per week on food (80% is spent on food consumed in the home). A decline in the consumption of dairy and red meat products is noted while expenditures for fresh produce and poultry meat is on the rise.
- The traditional N.Z. 'starting from scratch' meal is in decline while heat & eat, frozen foods and ethnic carry-out food consumption is increasing.
- New Zealand's aging population and a media focus on health is creating a health conscious consumer with a desire for fresh foods, diversity of product, and foods perceived as healthy.
- A multi-cultural population is fostering an increase in the consumption of ethnic foods. Supermarkets are responding to this with increased shelf space and an expanded range of ethnic products with fresh, frozen and ready-to-eat meals.
- The trend towards meat-free meals is growing. Half of all New Zealand consumers eat at least one meat-free meal per week.
- Snack food sales rose 6 percent to US$61 million in 2001. Sales of potato chips rose 3.5 percent, cereal snacks 8 percent and packaged nuts 13 percent. Children's lunchbox snacks account for 78 percent and adult health snacks account for 22 percent of the total.
- New Zealanders are moving away from the traditional sit-down breakfast. Sales of breakfast bars, liquid breakfasts (yogurt based etc.) and hot cereal rose 20 percent last year.
- Almost 60 percent of New Zealanders have access to the internet. More than one in five internet users have purchased a product or service via the internet. Although food purchasing activities by internet is growing, it is still only modest.
- Due to busy lifestyles and demanding workplaces, away-from-home food consumption and ready-to-eat and heat & eat meals are on the rise. Microwave ovens are present in 70 percent of homes. Sales opportunities for U.S. exporters of microwave-ready meals and snacks exist, but strong competition is offered by Australian and New Zealand products.

B. CONVENIENCE STORES/GAS STATIONS

Overview

Gasoline stations in New Zealand are the main players in the convenience store market. These stores are positioned at the petrol outlet and can be immediately identified with the petrol company. Stations and food marts are open 24 hours a day, seven days a week. They sell fast food, snack food and a limited range of grocery items.

Entry Strategy

- Appoint a local agent/distributor in New Zealand to ensure distribution, availability of product, and product promotion.
- Gas station convenience stores generally offer for sale a limited grocery range, and ready-to-eat hot foods. They operate 24 hours a day.
- Convenience stores usually buy their food products from the supermarket chains. Increasingly, they are turning their purchasing to importers and local manufacturers.

COMPANY PROFILES

Gasoline convenience stores account for a significant portion of New Zealand's food retailing industry. Nearly 1,475 gas mart stores throughout the country operated in 2001. There are five competing gasoline companies in New Zealand, four of which have adopted marketing names for their retail convenience stores.

Retailer Name (Store Name)	Ownership	No. of outlets	Purchasing type
Shell (Select)	New Zealand	329	Wholesalers/Distributors
Caltex (Star Mart/Challenge)	U.S.	446	Wholesalers/Distributors
BP (Express/Connect)	British	348	Wholesalers/Distributors
Mobil (On the Run/Mart)	New Zealand	262	Wholesalers/Distributors
Gull	New Zealand	22	Wholesalers/Distributors

Caltex launched the stand-alone convenience store concept two years ago. It is now establishing Star Mart convenience stores in locations where foot traffic rather than vehicular traffic is prominent. In these outlets, Star Marts do not sell gasoline.

Another recent trend in New Zealand is the partnership of supermarket chains with gasoline stations to offer greater shopping convenience. The Woolworth supermarket chain, now part of Progressive Enterprises, recently formed a partnership with the Gull gasoline company which will offer two types of convenience stores: smaller stores called Micros and larger convenience stores called Quickstop. Micros and Quickstop stores are complimentary to Woolworth's larger supermarket store format. The emphasis is on convenience. They do not offer a full range of food products.

British Petroleum (Express/Connect) also has introduced a new food concept of 24 hour, fresh baked café-style food and gourmet coffee in their convenience stores.

C. TRADITIONAL MARKETS, SMALL INDEPENDENT GROCERY STORES

Corner stores called dairies are declining in New Zealand because of the popularity of gasoline station/convenience stores which operate 24 hours, seven days a week. Most dairies usually offer a limited selection of staple groceries and snack foods such as milk, bread, soda, potato chips, ice cream and candy.

U.S. exporters have limited opportunities for sales of U.S. food products through dairy stores which tend to source their inventory locally through large retail supermarkets. New Zealand does not have a ‘terminal market’ system which independent small grocers might utilize to source their food needs. Greengrocers which specialize in fresh produce purchase a limited selection of their fruit from importers. In general, New Zealand’s greengrocers rely on traditional, open air markets to obtain their fresh produce requirements.

SECTION III. COMPETITION

Australia supplies more than 50 percent of the total value of New Zealand’s imports of consumer-oriented food products, due largely to lower transport costs and the Closer Economic Relations Agreement which eliminated tariffs on Australian food products. U.S. food products are assessed import tariffs ranging from 0-7 percent.

Many multinational companies, including American firms, have a manufacturing base in Australia and often well established brands of food products into the New Zealand market. Aside from Australia, there is only limited competition to U.S. exports of consumer-oriented food products in New Zealand. The United States is the second largest supplier of processed foods to New Zealand, holding a 12 percent market share. There is some competition from certain Canadian products, particularly canned fish *(salmon)*, bacon and the pork products and a few grocery items such as mayonnaise, pickles and syrups. Canadian products enter New Zealand duty free.

Section IV: Best High-value Product Prospects

- Fresh fruit, especially grapes, stone fruit (nectarines, peaches and plums), strawberries, cherries, citrus and pears during New Zealand’s off-season period;
- Snack foods including nuts (almonds, pistachios, walnuts) and dried fruit (raisins, mixed fruit, dates, figs);*
- Microwave meals, frozen foods, meal replacement drinks, soups, pasta, sauces, dressings and canned foods;
- Fruit juices and flavored drinks. Carbonated drinks and fruit juice account for 30 percent and 16 percent respectively, of the New Zealand beverage market.
- Health foods such as high energy bars and drinks;
- Organic foods, including cereals and snack products;
- Niche market food preparations, especially new products or those offering special nutrition, convenience or taste preferences;
- Pet food
- Canned salmon

(*Note: Many U.S. processed food products are sold in bulk volume to New Zealand importers and are used for further processing and/or are re-packaged in New Zealand before being sold at the retail level)

B. PRODUCTS NOT PRESENT IN SIGNIFICANT QUANTITIES BUT WHICH HAVE GOOD SALES POTENTIAL

- Health foods, including high energy bars and drinks;
- Niche market food preparations, especially new products or those offering special nutrition or other benefits or conveniences
- Ethnic foods
- Wine. Sales of high end products could grow with promotional support.

C. PRODUCTS NOT PRESENT BECAUSE THEY FACE SIGNIFICANT BARRIERS

- Uncooked poultry meat from the U.S. cannot meet revised NZ import regulations
- Miscellaneous fresh fruit. Some products could have access if an import health standard is concluded (e.g. melons)
- Pork meat imports must be cooked to certain temperatures either before export or after import into New Zealand.

SECTION V. POST CONTACT AND FURTHER INFORMATION

United States Embassy/Wellington
Foreign Agricultural Service
Address: PSC 467, Box 1, FPO AP, 96531-1034
Phone: (64) (4) 462-6030; Fax: (64) (4) 472-6016
e-mail: agwellington@fas.usda.gov
Internet homepage: http://www.usembassy.org.nz

List of Useful Government Agencies and Trade Associations

Food Standards Australia New Zealand
PO Box 10559
Wellington 6036
New Zealand
Tel: 64-4-473-9942; Fax: 64-4-473-9855
Email: NZ.reception@foodstandards.gov.au
Internet Homepage: http://www.foodstandards.govt.nz

Ministry of Agriculture and Fisheries (MAF)
PO Box 2526
Wellington
New Zealand
Tel: 64-4-474-4100; Fax: 64-4-474-4111

Internet Homepage: http://www.maf.govt.nz

Ministry of Health
PO Box 5013
Wellington
Tel: 64-4-496-2360; Fax: 64-4-496-2340
Internet Homepage: http://www.moh.govt.nz

New Zealand Grocery Marketers' Association
Enterprise House P.O. Box 11-543
Wellington, New Zealand
Phone: 64-4- 473-3000; Fax:64-4-473-3004